

IMATCH TRAINING

BASIC FEATURES

DEPARTMENT OF EDUCATION – CHILD & ADULT NUTRITION SERVICES – 8/25/22

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ABOUT IMATCH

- Direct Certification system – used by SFAs to identify students eligible for free meal benefits via assistance programs (SNAP, TANF)
- System compares enrollment information from Infinite Campus and DSS data nightly
- Identical entries between the two files are matched, and listed on the corresponding school district list

FEATURES TO COVER



Obtaining Direct Certification List



Direct Certification Notification Letters



New Match Notification Email to SFA



Determine daily change of Direct Cert List



Direct Certification by school site



File Search feature



How to use the Potential Matches tab

OBTAINING THE DIRECT CERTIFICATION LIST

- Student Eligibility → Administration → DC Matching → Matched tab

The screenshot displays the 'Student Eligibility' system interface. The 'Student Eligibility' tab is selected in the top navigation bar. On the left sidebar, the 'Administration' menu is expanded, and 'DC Matching' is highlighted. The main content area is titled 'DC Matching' and features four tabs: 'Potential Matches', 'Sibling Search', 'Matched', and 'File Search'. The 'Matched' tab is active. Below the tabs, there are search filters for 'Academic Year' (a text input field) and 'Site Code' (a dropdown menu set to '-- ALL --'). The 'Site' dropdown menu is also set to '-- ALL --'. The interface is divided into several sections: 'Student Details' with input fields for 'Last Name', 'First Name', 'ID', and 'Grade' (set to '--All--'), and a 'Status' section with 'Active' and 'Inactive' checkboxes. The 'Date' section includes radio buttons for 'File', 'Effective', and 'Match' (selected), along with 'From' and 'To' date pickers. The 'Match Method' section has checkboxes for 'System', 'Sibling', 'Manual', and 'Transfers', all of which are checked. The 'File Details' section has a 'Case Number' input field. On the right side, there are 'Reset' and 'Apply' buttons. At the bottom, the 'Options' section contains two checkboxes: 'Exclude Previously Notified Students' and 'Exclude Previously Free Students', both of which are unchecked.

EXCLUDE CHECKBOXES

- Un-check the Exclude Checkboxes

DC Matching

Potential Matches Sibling Search **Matched** File Search

Academic Year
[]

Site Code: -- ALL -- [v] Site: -- ALL -- [v]

Student Details
Last Name: []
First Name: []
ID: []
Grade: --All-- [v] Status: Active Inactive

Date
 File Effective Match
From: [] []
To: [] []

Match Method ⓘ
 System
 Sibling
 Manual
 Transfers

File Details
Case Number: []

Reset
Apply

Options
 Exclude Previously Notified Students Exclude Previously Free Students

OBTAINING THE DIRECT CERTIFICATION LIST - EXPORTING

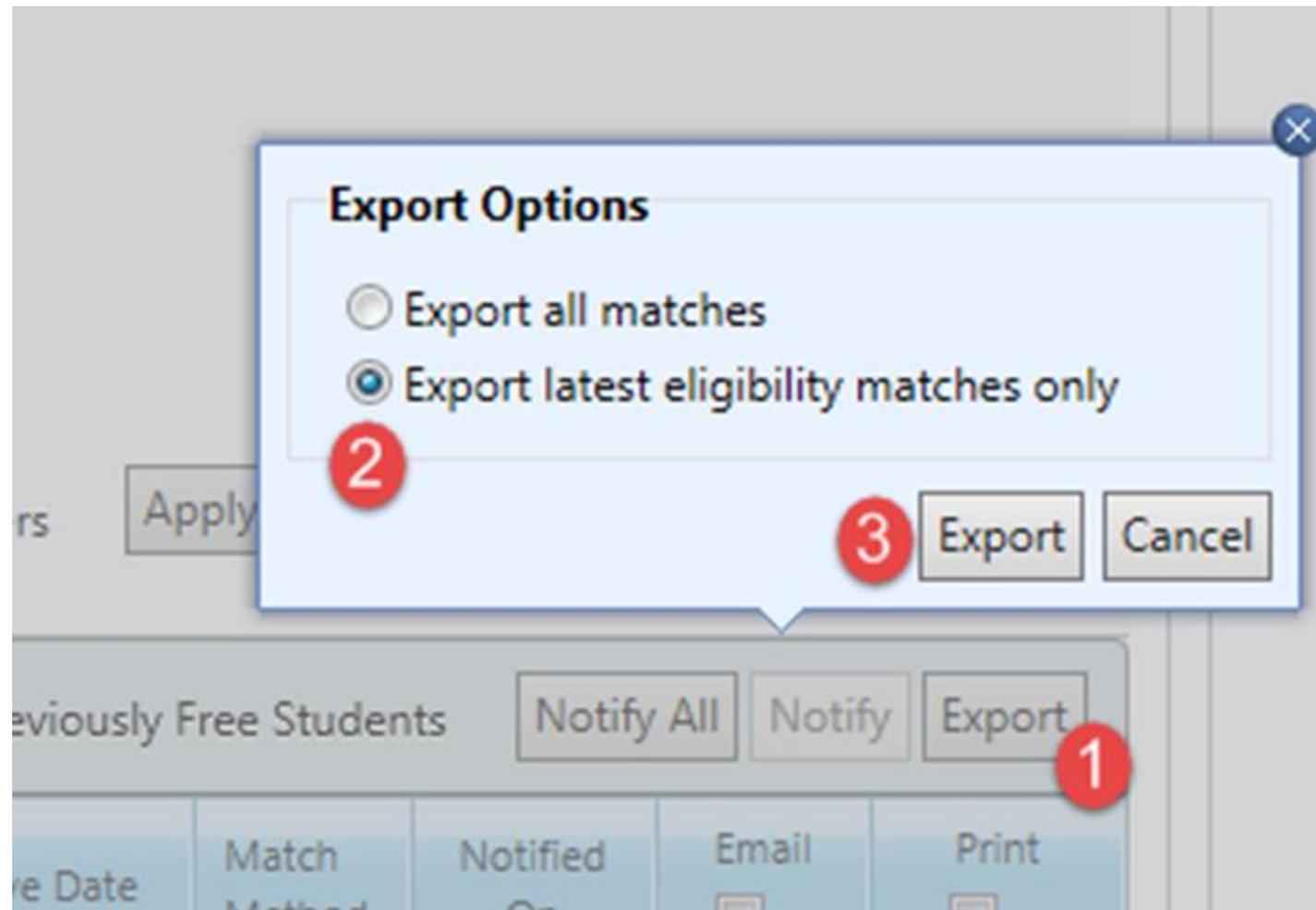
- Export allows to save full list in Excel format

Matched Students Exclude Previously Notified Students Exclude Previously Free Students

ID	Last Name	First Name	Site	Grade	File Date	Match Date	Effective Date	Match Method	Notified On	Email	Print
>			001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	<input type="checkbox"/>	<input type="checkbox"/>
>			001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	<input type="checkbox"/>	<input type="checkbox"/>
>			001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	<input type="checkbox"/>	<input type="checkbox"/>
>			001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	<input type="checkbox"/>	<input type="checkbox"/>
>			003	08	7/6/2016	7/6/2016	7/6/2016	System	1/27/2017	<input type="checkbox"/>	<input type="checkbox"/>
>			001	12	8/5/2016	8/5/2016	8/5/2016	System	1/27/2017	<input type="checkbox"/>	<input type="checkbox"/>
>			001	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	<input type="checkbox"/>	<input type="checkbox"/>
>			001	10	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	<input type="checkbox"/>	<input type="checkbox"/>
>			001	11	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	<input type="checkbox"/>	<input type="checkbox"/>
>			099	12	7/1/2016	7/1/2016	7/1/2016	System	1/27/2017	<input type="checkbox"/>	<input type="checkbox"/>

OBTAINING THE DIRECT CERTIFICATION LIST - EXPORTING

- Export allows to save full list in Excel format



NOTIFICATION LETTERS

Matched Students												Notify All	Notify	Export
ID	Last Name	First Name	Site	Grade	File #	File Date	Match Date	Effective Date	Match Method	Notified On	Email <input type="checkbox"/>	Print <input type="checkbox"/>		
>			003	06	2235	7/1/2019	7/9/2019	7/1/2019	System	8/1/2019		<input type="checkbox"/> 		
>			001	11	2235	7/1/2019	7/9/2019	7/1/2019	System	8/1/2019		<input type="checkbox"/> 		
>			001	09	2235	7/1/2019	7/9/2019	7/1/2019	System	8/1/2019		<input type="checkbox"/> 		
>			009	05	2235	7/1/2019	7/9/2019	7/1/2019	System	8/1/2019		<input type="checkbox"/> 		
>			002	07	2235	7/1/2019	7/9/2019	7/1/2019	System	8/1/2019		<input type="checkbox"/> 		
>			001	09	2235	7/1/2019	7/9/2019	7/1/2019	System	8/1/2019		<input type="checkbox"/> 		
>			001	11	2235	7/1/2019	7/9/2019	7/1/2019	System	8/1/2019		<input type="checkbox"/> 		
>			001	12	2235	7/1/2019	7/9/2019	7/1/2019	System	8/1/2019		<input type="checkbox"/> 		
>			002	06	2235	7/1/2019	7/9/2019	7/1/2019	System	8/1/2019		<input type="checkbox"/> 		
>			001	12	2235	7/1/2019	7/1/2019	7/1/2019	Transfer			<input type="checkbox"/> 		

NOTIFICATION LETTERS

Student Eligibility

System

Sites and Users

Sponsors/SFAs

Users

Sites

Site Types / Grade Groups

Sponsor/SFA Details:

General Info

Officials

Sites

Users

Grace Period

This information is used to populate letters. Blank fields may impact readability.

Child Nutrition Director

Title:	<input type="text" value="Food Service Director"/>	Email:	<input type="text" value=""/>
User Name:	<input type="text" value=""/> ...	Salutation:	--Select--
First Name:	<input type="text" value=""/>	Last Name:	<input type="text" value=""/>
Street / PO Box:	<input type="text" value=""/>		
Address 2:	<input type="text" value=""/>		
City:	<input type="text" value=""/>	State:	SD
Phone:	<input type="text" value=""/>	Zip:	<input type="text" value=""/>
		Fax:	<input type="text" value=""/>

- System →
- Sites and Users →
- Sponsors/SFAs
 - Official tab

NOTIFICATION LETTERS

- Official tab – Determining Official

Determining Official

Title:	<input type="text" value="Business Manager"/>	Email:	<input type="text" value="[Redacted]"/>
User Name:	<input type="text"/> ...	Salutation:	--Select--
First Name:	<input type="text" value="Jim"/>	Last Name:	<input type="text" value="Johnson"/>
Street / PO Box:	<input type="text" value="[Redacted]"/>		
Address2:	<input type="text"/>		
City:	<input type="text" value="[Redacted]"/>	State:	SD
Phone:	<input type="text" value="(605) 555-5555"/>	Zip:	<input type="text" value="[Redacted]"/>
Fax:	<input type="text" value="[Redacted]"/>	<input type="button" value="Save"/>	

NEW MATCH NOTIFICATION EMAIL

- Student Eligibility → Administration → DC Matching → Matched tab

DC Matching

Potential Matches Sibling Search **Matched** File Search

Academic Year
[Redacted]

Site Code: -- All -- Site: -- All --

SSN / Student ID: [Redacted] Last Name: [Redacted] First Name: [Redacted] Grade: --All-- Status: Active

Case Number: [Redacted] Match Date From: [Redacted] Match Date To: [Redacted] Match Method: System Sibling Manual Transfers

Apply Reset

Add a one-day buffer in the 'From' date range

From: IMATCH@state.sd.us <IMATCH@state.sd.us>
Sent: Friday, January 20, 2017 2:03 PM
To: [Redacted]
Subject: New Direct Approval Matches for 1/20/2017

Good Afternoon,

You have new Direct Approval matches that are ready to be notified. They can be found by following this path: *Student Eligibility* >> *Administration* >> *DC Matching*: Click the previously matched tab, and then check the Exclude Previously Notified Students checkbox.

Have a great day!

ELIGIBILITY HIERARCHY

iMATCH identifies the hierarchy of direct certification benefits

▪ SNAP > TANF

▪ Supersede to direct certification – highest form of direct certification is SNAP

▪ Patrons → Students
→ search for a student → click on the Student ID

Student Eligibility System

Applications

Administration

Direct Approvals

DC Matching

Grace Period Letters

1 Patrons

2 Students

Students

Site Code: --ALL-- Site: --ALL-- Grade: --ALL--

Student ID/SSN PIN State ID

3 Last Name First Name

Student ID/SSN Birth Date Status: Active

Apply Reset

DATE RANGE

- Student Eligibility → Administration → Matching

DC Matching

Potential Matches | Sibling Search | **Matched** | File Search

Academic Year: 2017 - 2018

Site Code: -- All -- | Site: -- All --

SSN / Student ID: | Last Name: | First Name: | Grade: --All-- | Status: Active

Case Number: | Match Date From: **1** | Match Date To: **2** | Match Method: **3**

System Sibling Manual Transfers

Matched Students Exclude Previously Notified Students Exclude Previously Free Students

ID	Last Name	First Name	Site	Grade	File Date	Match Date	Effective Date	Match Method	Notified On	Email	Print
										<input type="checkbox"/>	<input type="checkbox"/>

DIRECT CERTIFICATION LIST

- Column Sorting

Matched Students											Notify All	Notify	Export
ID	Last Name	First Name	Site	Grade	File #	File Date	Match Date	Effective Date	Match Method	Notified On	Email	Print	
>			003	06	2235	7/1/2019	7/9/2019	7/1/2019	System	8/1/2019	<input type="checkbox"/>	<input type="checkbox"/>	
>			001	11	2235	7/1/2019	7/9/2019	7/1/2019	System	8/1/2019	<input type="checkbox"/>	<input type="checkbox"/>	
>			001	09	2235	7/1/2019	7/9/2019	7/1/2019	System	8/1/2019	<input type="checkbox"/>	<input type="checkbox"/>	

DIRECT CERTIFICATION BY SITE

- Student Eligibility → Administration → DC Matching → Matched tab

The screenshot displays the 'DC Matching' interface. On the left, a navigation menu includes 'Student Eligibility' (highlighted with a red box), 'System', 'Applications', 'Administration' (highlighted with a red box), 'Direct Approvals', 'DC Matching' (highlighted with a red box), 'Grace Period Letters', 'Patrons', and 'Application Reports'. The main area is titled 'DC Matching' and features four tabs: 'Potential Matches', 'Sibling Search', 'Matched' (highlighted with a red box), and 'File Search'. Below the tabs, there are several search filters: 'Academic Year' (blurred), 'Site Code' (dropdown menu), 'Site' (dropdown menu, highlighted with a blue box and a blue arrow pointing to it with the text 'Select a specific site'), 'SSN / Student ID' (text input), 'Last Name' (text input), 'First Name' (text input), 'Grade' (dropdown menu), 'Status' (dropdown menu), 'Case Number' (text input), 'Match Date From' (calendar icon), 'Match Date To' (calendar icon), and 'Match Method' (checkboxes for System, Sibling, Manual, and Transfers). The 'Apply' button is highlighted with a red box, and a 'Reset' button is located next to it.

DIRECT CERTIFICATION BY SITE

Student Eligibility System

Administration
Direct Approvals
DC Matching
Patrons
Eligibility Reports
DC Sibling
Eligibility Roster
Configuration

Eligibility Roster

Site Code: --ALL-- Site: --ALL-- Grade: --ALL--

As of Date: 6/29/2016

Eligibility

- Free
- Reduced
- Paid

Options

- Display Eligibility Code
- Display Contact Info
- Sort by Grade
- Only Verification Sites

Include

- Inactive Students
- Inactive Sites

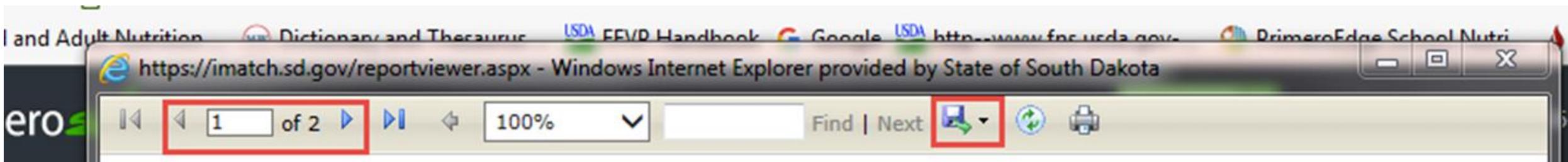
Reason

- Uncheck All
- Categorical
- CEP Transfer
- DC Foster
- DC Medicaid
- DC SNAP
- DC Unmatched
- Default
- Denied
- Direct Cert
- Even Start
- Foster
- Grace Period
- Head Start
- Homeless
- Import
- Income
- Migrant
- Pre-Approval
- Principal Approved
- RCCI
- Refused Benefits
- Removed
- Runaway
- Transfer
- Verification

Generate Report

DIRECT CERTIFICATION BY SITE

- Arrows allow user to page through to additional students, or additional sites
- Floppy disk Save icon allows users to save file as Excel
 - Saving as Excel features each site to display as a different tab in Excel



AUTOMATIC SIBLING EXTENSION

- Feature allows for SNAP/TANF benefits to be extended to siblings when at least 3 of the 4 following criteria is met:
 - 1. Students in the same household
 - Come in together on a DC file – previously matched together as siblings by school/auto thru sibling match
 - 2. Students must have same address
 - 3. Students must have the same last name
 - 4. Students must have the same guardian

AUTOMATIC SIBLING EXTENSION

- The system also has a 'Matching Details' description within the student match extension
- The reasoning for matching is also displayed in an eligibility report
 - (Student Eligibility → Eligibility Reports → DC Reports)

The screenshot displays the 'Student Eligibility System' interface. On the left, a navigation menu includes 'Administration', 'Patrons', 'Eligibility Reports', 'Eligibility Roster', and 'DC Reports'. The 'DC Reports' section is active, showing two tabs: 'DC Sibling' and 'DC Matching Comments'. Below the tabs, there are two dropdown menus for 'Site Code' and 'Site', both set to '-- ALL --'. A 'Sorting' section contains two radio buttons: 'Alphabetical By District' (selected) and 'Alphabetical By Site'. A 'Generate Report' button is located at the bottom right of the interface.

POTENTIAL MATCHES

- Student Eligibility
- Potential Matches
- DC Matching

Student Eligibility System

Applications

Administration

Direct Approvals

DC Matching

Grace Period Letters

Patrons

Students

Application Reports

Direct Approval

DC Matching

Potential Matches Sibling Search Matched File Search

Student Details

Last Name: First Name:

ID: Birth Date:

Probability

High

Medium

Compare Status

Not Reviewed

Reviewed

Reset

Apply

Potential Match Details ⓘ

PrimeroEdge Student Details				Certification File Details				
Student ID	Last Name	First Name	Birth Date	ID on File	Last Name	First Name	Birth Date	Probability
No records to display.								

POTENTIAL MATCHES - REVIEWING ENTRIES

Potential Match Details ⓘ 1

PrimerEdge Student Details					Certification File Details 2				
Student ID	Last Name	First Name	Birth Date	Eligibility	Last Name	First Name	Birth Date	Probability	
				Paid (Default)				High (42)	More...

3 [Compare...](#)

POTENTIAL MATCHES

Matching Criteria

Reviewing Possible Match

Making the Match

Matching Criteria	Student Details	File Details	Points
SSN			0
Student ID			0
State ID			0
Full Name			0
First and Last Name			0
Last and Middle Name			0
First and Middle Name			0
Last Name			10
First Name			0
DOB			14
Phonetic First Name			0
Phonetic Last Name			0
SOUNDEX First Name			0
SOUNDEX Last Name			0
Modified First Name			0
Modified Last Name			0
Name Twist Full Name			0
Name Twist First and Last Name			0
Variable DOB (±10 day(s))			0
DOB Month Year Twist			0
Gender			0
Street Address			0
Guardian			6
Phone 1			0
Phone 2			0
County Code(s)	Brown	Brown	12
Total - 42 (High)			

Comments: (Limited to 500 Characters)
Please enter comments if this is an appropriate match.

Provide reason/comment, then click 'Match'

If not a match, click 'Mark as Reviewed'

FILE SEARCH

- Student Eligibility
- Administration
- DC Matching
- File Search

Potential Matches | Sibling Search | Matched | **File Search**

Search By

SSN and Birth Date Name and Birth Date Case Number State ID

Details

Case Number **1**

2

File Details

PrimeroEdge Student Details		Certification File Details							
	Match Card	ID on File	State ID	Last Name	First Name	Birth Date	Case Number	DC Type	File Date
3	<input type="button" value="..."/>								
	<input type="button" value="..."/>	View Details...							
		View Details...							

4

MANUAL MATCH FROM FILE SEARCH

Potential Matches | Sibling Search | Matched | **File Search**

Search By

SSN and Birth Date
 Name and Birth Date
 Case Number
 State ID

Details

Case Number **1**

Reset

Apply **2**

File Details

PrimerEdge Student Details		Certification File Details							
Match Card	ID on File	State ID	Last Name	First Name	Birth Date	Case Number	DC Type	File Date	
<input type="button" value="..."/> 3	View Details...								
<input type="button" value="..."/>	View Details... 4								

Student Lookup Page →

PrimerEdge - Lookup

Site Code: --ALL-- | Site: --ALL-- | Grade: --ALL--

Student ID/SSN
 Last Name
 First Name

PIN
 State ID

ID/SSN: Birth Date: Status: Active

1

Results List:

Name	Student ID/SSN	Site Name	Grade	Homeroom	Birth Date
>					
>					

MANUAL MATCH FROM FILE SEARCH

File Details

PrimerEdge Student Details		
	Match Card	ID on File
	View Details...	

4

Search Matched File Search

Matching Criteria

- SSN
- Student ID
- Full Name
- First and Last Name
- Last and Middle Name
- First and Middle Name
- Last Name
- First Name
- DOB
- Phonetic First Name
- Phonetic Last Name
- SOUNDEX First Name
- SOUNDEX Last Name
- Modified First Name
- Modified Last Name
- Name Twist Full Name
- Name Twist First and Last Name
- Variable DOB (±10 day(s))
- DOB Month Year Twist
- Street Address
- Guardian
- Phone 1
- Phone 2
- County Code(s)

Student Details **File Details**

Match **Close**

Name	Student ID/SSN	Site Name	Grade	Homeroom	Birth Date
>					
>					

QUESTIONS??

CANS Office

- Email: DOE.SchoolLunch@state.sd.us
- Phone: 605-773-3413

PrimerEdge Customer Support

- Email: support@primeroedge.com
- Phone: 1-866-422-6030

IMATCH USER TRAINING

- This training credits for 45 minutes of training in
- **Key Area 3 - Administration**
 - 3120 Direct Certification

Your Name:

Date of Training:

NONDISCRIMINATION STATEMENT

- In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA.
- Persons with disabilities who require alternative means of communication for program information (e.g. Braille, large print, audiotape, American Sign Language, etc.), should contact the Agency (State or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.
- To file a program complaint of discrimination, complete the [USDA Program Discrimination Complaint Form](#), (AD-3027) found online at: [How to File a Complaint](#), and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:
 1. mail: U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410;
 2. fax: (202) 690-7442; or
 3. email: program.intake@usda.gov.

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